

## 3-Way Conference Call Checklist

The 3-way conference call is held between the Project Director (PD), Grant Manager (GM), and the Program Analyst (PA)

- ☐ Keep the call to one hour.
- ☐ No line-by-line discussions, clarification on strikeout/underline questions/comments only.
- ☐ Focus, stay on target, you are there to get agreement on the scope of work.
- ☐ If the GM or the PD wants others involved in the conference call, only one person can speak for the PD. If the GM and PD want to discuss any issue in more depth, do so after the PA is off the phone.
- ☐ Negotiate a start date for the project and discuss dates for the items for review.
- ☐ The GM and PD should agree on a deadline for submittal of the final package to the PA. If the final package is not received within a week of the deadline, the PA will provide a friendly reminder to both.